



# **Grantee Training Manual**

## **Federal Financial Reports and Performance Progress Reports**

**Prepared by BearingPoint, Inc.**

Version 2.6

April 17, 2006





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## Document Conventions

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**Overview** Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process and is written to address your role as a grantee within Grants Online.

**Using this Guide** The following conventions were used in creating this manual. The manual uses block label text in order to scan for the information desired.

### Text Conventions

#### Text; Example

Text in Bold; Click **Done**

Text in Italics; *CD450 Details* screen appears.

Text in Bold Italics; ***Name***

Text in All Caps; LOGIN

#### What it means.

Indicates a command.

Indicates a screen.

Indicates data to be entered into a field.

Indicates a field name.

### Notes and Warnings

Notes and Warnings are used to indicate information or advisories when using Grants Online.



**Note:** A note is used to inform you about additional information during the procedure or process.



#### Warning!

Business process may not work as desired or a procedure may produce an undesirable effect.

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## Grants Online Overview

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### Overview

The National Oceanic and Atmospheric Administration (NOAA) offers a variety of competitive and non-competitive grants and Awards to various communities including States, Universities, and non-profit organizations. Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program policies. The process of awarding grants to the most qualified applicant for a competitive Award, and to qualified designated applicants of non-competitive Awards, was also largely paper-driven.

As part of its strategy to move scientifically and operationally into the 21<sup>st</sup> century, Grants Online was developed. Grants Online is an E-Government initiative to create an automated tool that will support the grants management lifecycle activities. Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the agency to increase efficiencies related to mission goals.

Grants Online is developed to answer several issues that occur during the award processing including:

- Reduce or eliminate paper forms for application.
- Provide an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reduce the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Grantees.
- Serve the NOAA community in its efforts to meet its mission goals more effectively.

Grants Online allows Grantees to:

- Accept Awards electronically.
- Manage user roles for individuals within their organization.
- Submit post-Award Action Requests and Performance Progress Reports.

## Grants Online Software Description

### About Grants Online

Grants Online operates in a web environment, and can be accessed anywhere at anytime provided that you have Internet access. You will be required to use an Internet browser to log in and use Grants Online. Internet Explorer is the preferred browser for PC users; FireFox is the preferred browser for MAC users. No software is required for installation. Logins and passwords are required and will be relayed to you once you are established within the system



**Note:** You must have an Internet connection in order to access Grants Online.



**Warning:** Please do not use the browser "Back" button in Grants Online. Using the browser "Back" button will log you out of Grants Online.

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## Getting Started

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**Overview** When you are using any Windows-based software, navigation and ease of use are key components. Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users in navigating and using the system appropriately. In this module, you will be shown the basics of Grants Online, including the look and feel of the system, navigation, and user customizations.

**Module Objectives** In this module you will accomplish the following objectives:

- Obtaining your Grants Online password
- Logging into Grants Online

**Overview** Grants Online is accessible through your web browser, specifically Internet Explorer.

### Accessing Grants Online

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1. Click on the Internet Explorer Icon on your desktop to open the Internet Explorer browser.
2. Enter the following URL information in your address bar of your browser:  
<http://www.grantsonline.rdc.noaa.gov> then press **ENTER**
  - Grants Online Login page appears



## **Logging in to Grants Online**

1. If you are not the Grants Online Recipient Administrator for your organization, please contact that person to obtain your username and password. If you don't know your Recipient Administrator or you have been designated as the Recipient Administrator for your organization, contact the Grants Online Help Desk to obtain your username and password.
  - Phone: 301-713-1000 or toll free at 1-877-662-2468
  - Email: [grantsonline.helpdesk@noaa.gov](mailto:grantsonline.helpdesk@noaa.gov)
2. Enter your assigned **Username**.
3. Enter your assigned **Password**.
4. Click **Enter**.



### **Warning!**

If you enter an incorrect username or password, you will receive an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out. In such cases, you are required to contact your Recipient Administrator or the Grants Online Help Desk to unlock your account.

If nothing happens when you click enter, it means the server is down and will need to be restarted.

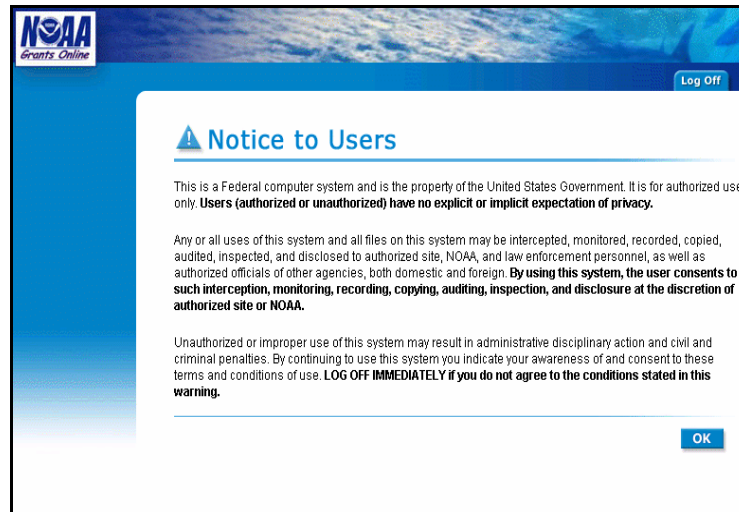


**Note:** If you click on the **Grants Online Training** link you can view and download training material including training manuals, quick reference guides, and online webinars.

## **Logging in to Grants Online**

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5. The *Notice to Users* screen appears.
6. Review disclaimer information and click **OK**.



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## **Federal Financial Reports and Performance Progress Reports**

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**Overview** In this module, you will learn how to search, complete, and submit Performance Progress Reports in Grants Online.

**Module Objectives** The Performance Progress Reports module will review the following objectives:

- Federal Financial Reports Overview
- Processing Performance Progress Reports
- Forwarding Performance Progress Reports to the agency as an Authorized Representative

### **Federal Financial Reports – Overview**

OMB has not yet approved the new Federal Financial Report and until OMB approves the new report for official use, NOAA will continue to process the SF-269 and the SF-272 outside of Grants Online. Grantees should continue to mail or email their reports to the Grants Management Division as they have done in the past before Grants Online. Report records containing the reporting period and submission dates will be uploaded into Grants Online on a periodic basis by the technical support staff so that the Grants File will contain records for submitted reports. However, unlike other Grants File documents, those records are not the "official" Financial Report records and are only an indicator that the reports have been submitted. Please look forward to further guidance and information on the Federal Financial Reports.

### **Performance Progress Reports – Overview**

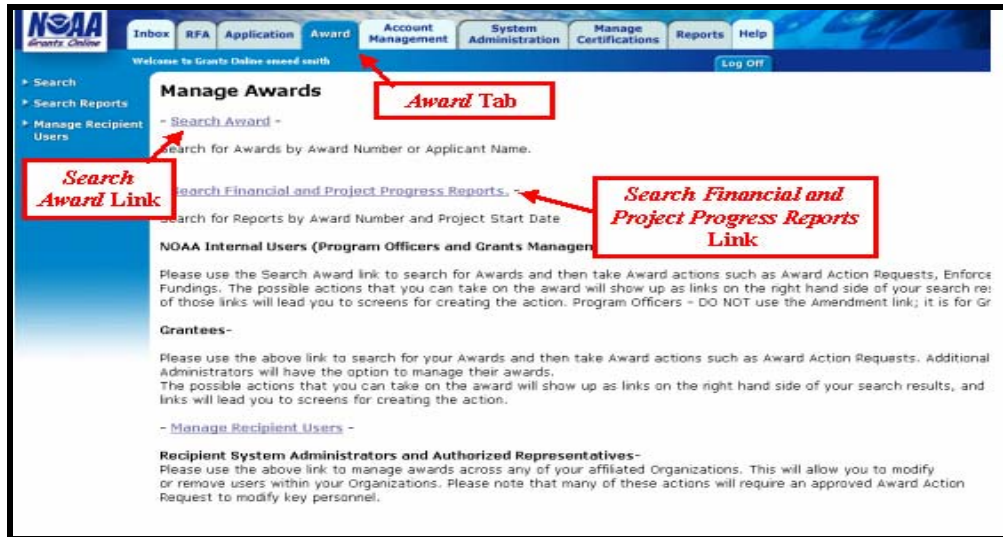
There are two versions of the Performance Progress Report: Simple and Expanded.

The **Simple Performance Progress Report** is an electronic means to enter some basic reporting information and attach the Performance Progress Report that grantees are currently submitting by paper or email. The advantage to submitting this report via Grants Online is that the report will initiate workflow actions for submission by the Recipient Authorized Representative and acceptance by the Federal Program Officer, with optional routing to other internal NOAA personnel for review. Additionally, the Grants Online data repository is becoming the Official Award File for all Award documents. By submitting the report via Grants Online, the recipient is credited the report submission without waiting or depending on others to enter the information.

The **Expanded Performance Progress Report** is based on a prototype Performance Progress Report currently under development by a Federal Review Board. It should not be used unless an agreement is in place with the Program Officer to use this report. At this time, nearly all grantees will use the Simple version of the Performance Progress Report.

## Completing Performance Progress Reports

1. Select the **Award** tab and click the **Search Award** link to search for the AWARD NUMBER of the report you wish to complete.



2. After selecting the **Search Award** link click **Submit**. This will return all Awards for which you are designated as a Principal Investigator. If you are an Authorized Representative or Business/Financial Representative, all Awards for your organization will be displayed. Alternatively, you may narrow the search by entering the **Award Number** before clicking **Submit**.



3. The following screen displays the search results. To select the Award, click on the actual Award number link in the **Award Number** column.

NOAA Grants Online

Inbox RFA Application **Award** Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online omeed smith [Log Off](#)

Search  
Search Reports  
Manage Recipient Users

### Search for Award

Applicant Name:

Award Number:

[Submit](#) [Reset](#)

Please use the above fields to narrow down your search.  
Award Number Searches are not case-sensitive, and award numbers can be partially filled in to get all matching results.

#### Search Results

One item found. 1

Award Number	Org ID	Applicant Name	Project Title	Award Status	Award Action Request	Manage Award
<a href="#">NA06NMF4330020</a>	1002370	University of Chicago	test fahma 3/17 2	Accepted	<a href="#">Create Award Action Request</a>	<a href="#">View/Manage Award-related Personnel</a>

- Once you have selected an Award, the following *Grants File* page is displayed. Please note the Grants file lists all of the Award files for the Award in the Sub Documents section. Award file 0 is the original Award and the subsequent Award files such as Award file 1 and Award file 2 represent either Amendments and/or Award Action Requests.

**Grants File - NA06NMF4330020**

Info: 2037098  
 Creator: System Account Create Date: 03/17/2006  
 Status: Grants File Approved Status Date: 03/17/2006  
 Last Edited User: System Account

This document currently has no tasks assigned to you.

**Grant Information**

CFDA Number:	11.423	Award Period:	04/01/2006 - 04/01/2007	Program Officer:	Fahima Zaher
Program Officer:	Fahima Zaher	Program Officer Phone:	122-123-1245	Program officer Email:	fzahim@noaa.gov
Total Federal Funding:	\$100,000.00	Total Non Federal Funding:	\$0.00	Multi-Year:	No
Organization Name:	University of Chicago	Electronic Recipient:	Yes	Financial Report Frequency:	N/A
Progress Report Frequency:	Semi-Annually	Project Title:	test fahima 3/17 2		

**Sub Documents**

7 items found, displaying all items. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date
Award Package	2037112	test fahima 3/17 2	System Account	03/17/2006	System Account	RecipientAuthorizedRepresentativeActions Complete AcceptAward	03/20/2006
Award File 0	2037099		System Account	03/17/2006	System Account	GrantsOfficerActions Complete ApproveAwardFile	03/17/2006
Award File 1	2037212		System Account	03/20/2006	System Account	IN Progress	03/20/2006
Award File 2	2037222		System Account	03/20/2006	System Account	IN Progress	03/20/2006
Award File 2	2037226		System Account	03/20/2006	System Account	IN Progress	03/20/2006
Award File 4	2037231		System Account	03/20/2006	System Account	IN Progress	03/20/2006
Award File 5	2037234		System Account	03/20/2006	System Account	IN Progress	03/20/2006

**Associated Documents**




14 items found, displaying all items. 1

Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Award Action Request	2037215	Sub award, transfer or contracting out of any work...	omeed smith	03/20/2006	omeed smith	Completed	03/20/2006	
Award Action Request	2037221	No Cost Extension - Without Invocation of Expended...	omeed smith	03/20/2006	omeed smith	CAMSFirstApproverActions Not Started	03/20/2006	
Award Action Request	2037223	Reprogram or Rebudget smith	omeed smith	03/20/2006	omeed smith	GrantsOfficerActions Complete ApproveRequest	03/20/2006	



5. Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and view the Performance Progress Reports. It is possible that the report you wish to create was pre-generated in anticipation of you finishing and submitting the report. If the status states “**In Progress**,” then the report is ready for you to complete and submit. Click on the ID link for the report.


Type	ID	Title	Creator	Create Date	Last Action User	Status	Status Date	Program Officer
Performance Progress Report	<a href="#">2036619</a>	07/01/2005 - 11/11/2005	Dennis A. Seem	03/01/2006	Dennis A. Seem	IN Progress	03/01/2006	Undefined
Performance Progress Report	<a href="#">2020051</a>	11/11/2004 - 11/11/2005	David Archer	11/22/2005	Dennis A. Seem	Accepted	01/31/2006	Ingrid Guch

 ID link
  Reporting Period
  Workflow Status



Note: If a Performance Progress record is not available for completion and submission, contact the Grants Online Help Desk to have the necessary report record added to the system.

6. The Performance Progress Report Screen is displayed. Select the link entitled, **Go to Performance Progress Report Details Page**.


[Inbox](#) [RFA](#) [Application](#) [Award](#) [Account Management](#) [System Administration](#) [Manage Certifications](#) [Reports](#) [Help](#)


Welcome to Grants Online smeed smith [Log Off](#)

[Search](#)  
[Search Reports](#)  
[Manage Recipient Users](#)

### Performance Progress Report - NA06NMF4330004

Id: 2022927  
 Creator: omeed smith  
 Status: Performance Progress Report IN Progress  
 Last Edited User: omeed smith  
 Create Date: 12/11/2005  
 Status Date: 12/11/2005

[Go to Performance Progress Report Details Page >>](#)  
 This document currently has no tasks assigned to you.

 Go to Performance Progress Report Details Page Link

#### Grant Information

CFDA Number:	11.433	Award Period:	01/01/2006 - 01/01/2007	Program Office:
Program Officer:	Fahima Zahir	Program Officer Phone:	123567876543	Program Officer Email:
Total Federal Funding:	\$99,000.00	Total Non Federal Funding:	\$0.00	
Organization Name:	University of Chicago	Electronic Recipient:	Yes	
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	N/A	
Project Title:	test			

5. The *Performance Progress Report – Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.
6. The large text box that is visible as part of the simple report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.

**Grant Information**

CFDA Number:	11.433	Award Period:	01/01/2006 - 01/01/2007	Program Office:	Fisheries St Program Of
Program Officer:	Fahima Zahir	Program Officer Phone:	123567876543	Program Officer Email:	non@non.c
Total Federal Funding:	\$99,000.00	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Chicago	Electronic Recipient:	Yes		
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	N/A		
Project Title:	test				

**Performance Progress Report - NA06NMF4330004 -- Simple Version**

Please click on this icon to add your comments or view comments by other users on this report:

**Comment Icon**

Spell Check

7. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.
8. Attach files by selecting the **Attach Files** link.
9. Once all the information has been entered, click the **Save** button, followed by the **Complete Report** button.

**Final Report**

☐ Yes ☒ No

**Reporting Period \***

(mm/dd/yyyy) - (mm/dd/yyyy)

**Due Date**

(mm/dd/yyyy)

**Recipient Primary Investigators:**

4 items found, displaying all items. 1

Name	Telephone
David Archer	312-702-1234; 0823
Douglas Crawford	
John Frederick	
Robin Hogarth	312/702-7271

**Recipient Authorized Representatives:**

5 items found, displaying all items. 1

Name	Telephone
David Archer	312-702-1234; 0823
John Frederick	
little john	ine@ine.com
Jane Sadaf	123-456-7890
ameed smith	123-234-5678

**Attach Files**

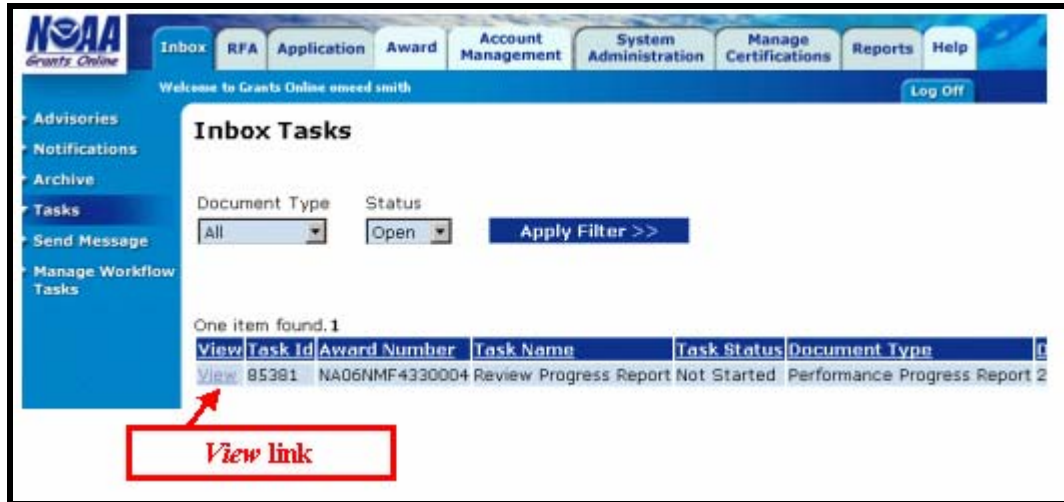
[Click here to use the Expanded version of this report.](#)

**Attach Files link and Expanded Version link**

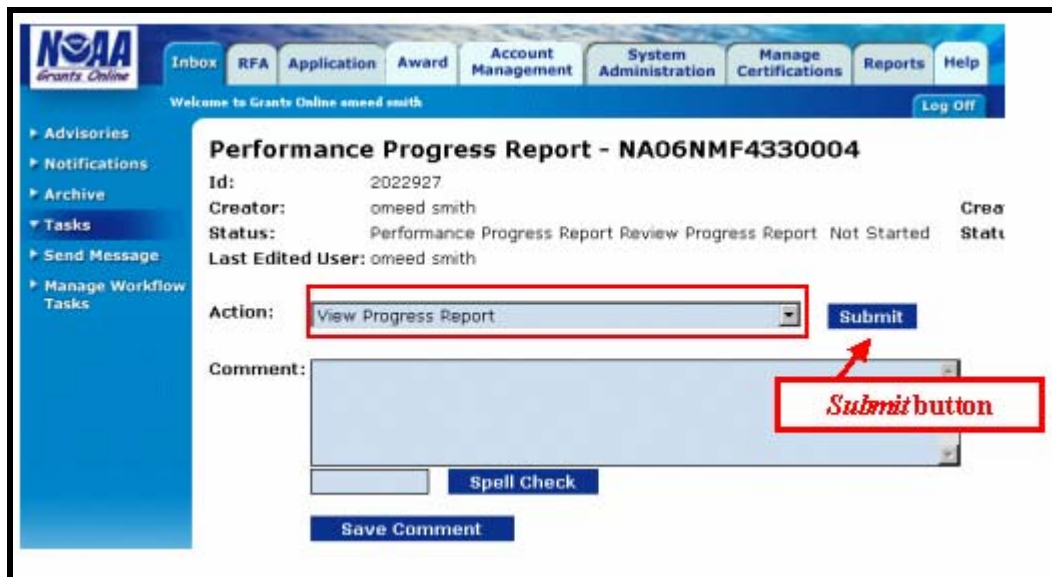
**Save button and Complete Report button**

Save Complete Report Cancel

10. Once you have completed the report and selected the **Complete Report** button from the *Performance Progress Report* screen, you will receive a task to Review the Performance Progress Report. Navigate to the **Inbox** tab, select **Tasks** from the menu on the left, and select the **View** link for the Review Performance Progress Report task.



11. The Performance Progress Report task launch page is displayed. From the action drop down menu select **View Progress Report** and select the **Submit** button.



12. After reviewing and editing the Performance Progress Report, select the **Complete Report** button.

The screenshot shows a web form for completing a report. At the top is a 'Due Date' field with a placeholder '(mm/dd/yyyy)'. Below it are two tables. The first table, 'Recipient Primary Investigators', has 6 items and displays all. It lists David Archer, Douglas Crawford, John Frederick, Robin Hogarth, Zach Johnson, and alka kumar with their respective telephone numbers. The second table, 'Recipient Authorized Representatives', has 4 items and displays all. It lists David Archer, John Frederick, little john, and omeed smith with their respective contact information. At the bottom are three buttons: 'Save', 'Complete Report', and 'Cancel'. A red arrow points from the 'Complete Report' button to a red box labeled 'Complete Report Button'.

Name	Telephone
David Archer	312-702-1234; 0823
Douglas Crawford	
John Frederick	
Robin Hogarth	312/702-7271
Zach Johnson	xxx
alka kumar	1234567890

Name	Telephone
David Archer	312-702-1234; 0823
John Frederick	
little john	ine@ine.com
omeed smith	123-234-5678

[Attach Files](#)

**Save** **Complete Report** **Cancel**

**Complete Report Button**

13. Upon clicking the **Complete Report** button, the task launch page is displayed. From the action drop down menu, select **Forward Progress Report to Authorized Representative** and click on the **Submit** button. A task will be sent to the Recipient Authorized Representative to Review the Performance Progress Report. The Recipient Authorized Representative will have the option to view the Progress Report, return the Progress Report to the creator for revisions, or forward the Progress Report to NOAA.

The screenshot shows the 'Performance Progress Report - NAO6NMF4330004' task launch page. The page has a header with the NOAA logo and a navigation bar with tabs: Inbox, RFA, Application, Award, Account Management, System Administration, Manage Certifications, Reports, and Help. Below the header is a sidebar with links: Advisories, Notifications, Archive, Tasks, Send Message, and Manage Workflow Tasks. The main content area displays the report details: Id: 2022927, Creator: omeed smith, Status: Performance Progress Report Review Progress Report In Progress, and Last Edited User: omeed smith. There is an 'Action' dropdown menu with the selected option 'Forward Progress Report to Authorized Representative' and a 'Submit' button. Below the action menu is a 'Comment' field with a 'Spell Check' button and a 'Save Comment' button. A red arrow points from the 'Submit' button to a red box labeled 'Submit button'.

**Performance Progress Report - NAO6NMF4330004**

**Id:** 2022927  
**Creator:** omeed smith  
**Status:** Performance Progress Report Review Progress Report In Progress  
**Last Edited User:** omeed smith

**Action:** Forward Progress Report to Authorized Representative **Submit**

**Comment:**  **Spell Check** **Save Comment**

**Submit button**

### Forwarding the Performance Progress Report to the Agency as an Authorized Representative

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Once a Performance Progress Report is complete, the Authorized Representative will receive a task in their inbox to review the report and forward it to the agency. This task is sent to all of the Authorized Representatives within your organization. For example, if there are three Authorized Representatives within your organization, each of them will receive the task to review the Performance Progress Report. Once one of the Authorized Representatives selects the **View** link for the task, they will own the task and the task will be removed from the inbox of the other two Authorized Representatives.

1. Select the **Inbox** tab followed by the **Tasks** link. Select the **View** link next to the Review Progress Report task.

NOAA Grants Online

Welcome to Grants Online smeed smith

**Inbox Tasks**

Document Type: All Status: Open Apply Filter >>

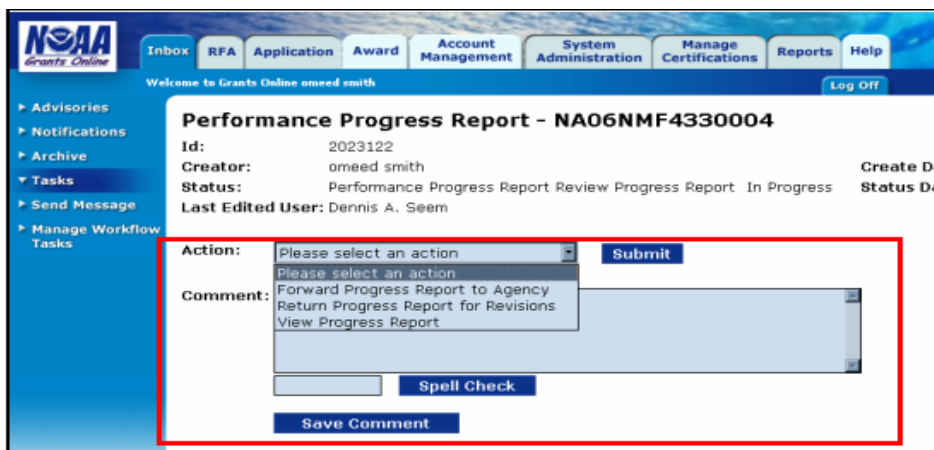
15 items found, displaying all items.1

View	Task	Award Number	Task Name	Task Status	Document Type	Document
View	91618	NA06NMF4330004	Review Progress Report	In Progress	Performance Progress Report	2023122

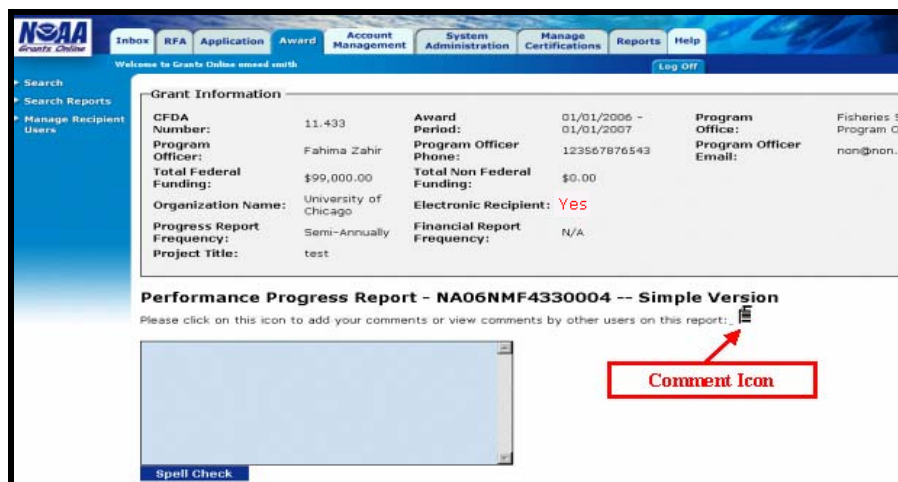


2. The following screen is the task launch page. From this screen you may select one of the following options:
  - **Forward Progress Report to Agency** – Select this action to forward the Progress Report to NOAA for review and Approval.
  - **Return Progress Report for Revisions** – Select this action to return the Progress Report to the creator for revisions. For example, if a Principal Investigator submitted this report, a task to review the Progress Report is sent to the Principal Investigator.
  - **View Progress Report** – Select this action to allow the Authorized Representative to view the report before forwarding the report to the agency.

For the purposes of this manual we will select **View Progress Report** followed by the **Submit** button.



3. The *Performance Progress Report – Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users.
4. The large text box that is visible as part of the Simple Report screen may be used to provide an overview or introduction to your report, including an explanation of the attached files. Alternatively, if you have a simple or short report, it may be entirely entered in this text box.



Grant Information					
CFDA Number:	11.433	Award Period:	01/01/2006 - 01/01/2007	Program Office:	Fisheries St
Program Officer:	Fahima Zahir	Program Officer Phone:	123567876543	Program Officer Email:	non@non.c
Total Federal Funding:	\$99,000.00	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Chicago	Electronic Recipient:	Yes		
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	N/A		
Project Title:	test				

5. Review the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. If you need to change this information, please contact the Grants Online Help Desk.
6. View and edit the attached files by selecting the **Attach Files** link.
7. Once all the information has been reviewed, click the **Save** button, followed by the **Complete Report** button.

The screenshot shows a web form for a Performance Progress Report. A red box highlights the 'Final Report' section with radio buttons for 'Yes' and 'No', and 'Reporting Period' and 'Due Date' date pickers. Below this are two tables for 'Recipient Primary Investigators' and 'Recipient Authorized Representatives'. A red box with an arrow points to the 'Attach Files' link. Another red box with an arrow points to the 'Save' and 'Complete Report' buttons. A third red box with an arrow points to the 'Attach Files' link and the 'Expanded Version' link.

**Final Report**  
☐ Yes ☒ No

**Reporting Period \***  
 (mm/dd/yyyy) - (mm/dd/yyyy)

**Due Date**  
 (mm/dd/yyyy)

**Recipient Primary Investigators:**  
 4 items found, displaying all items: 1

Name	Telephone
David Archer	312-702-1234; 0823
Douglas Crawford	
John Frederick	
Robin Hogarth	312-702-7271

**Recipient Authorized Representatives:**  
 5 items found, displaying all items: 1

Name	Telephone
David Archer	312-702-1234; 0823
John Frederick	
little john	me@me.com
Jane Sadaf	123-456-7890
omeed smith	123-234-5678

[Attach Files](#)  
 Click here to use the Expanded version of this report

[Save](#) [Complete Report](#) [Cancel](#)

8. The following screen is the task launch page. We are now going to select the **Forward Progress Report to Agency** action followed by the **Submit** button. This action will forward the Progress Report to NOAA for review and Approval. You may also enter a comment for NOAA in the COMMENT field. Be sure to enter and save your comment before selecting an action and submitting.

The screenshot shows the NOAA Grants Online interface. A red box highlights the 'Action' dropdown menu, the 'Comment' text area, the 'Submit' button, the 'Spell Check' button, and the 'Save Comment' button. The 'Action' dropdown is open, showing options: 'Please select an action', 'Forward Progress Report to Agency', 'Return Progress Report for Revisions', and 'View Progress Report'.

**Performance Progress Report - NA06NMF4330004**  
 Id: 2023122  
 Creator: omeed smith  
 Status: Performance Progress Report Review Progress Report In Progress  
 Last Edited User: Dennis A. Seem

**Action:** Please select an action [Submit](#)

**Comment:** Forward Progress Report to Agency  
 Return Progress Report for Revisions  
 View Progress Report

[Spell Check](#)  
[Save Comment](#)



### Warning!

Remember, comments entered here will not be available for future viewing by Grantee users. They will be available for internal NOAA users only.

For more information on any of the Grants Online functionality detailed in this manual, please contact the Grants Online Help Desk at 301-713-1000 or toll free at 1-877-662-2468.